

TPA Self Service User Guide

DUA QUEST Project

Division of Unemployment Assistance (DUA)

Commonwealth of Massachusetts

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QUEST System Overview

SYSTEM OVERVIEW

Introduction to QUEST	<p>QUEST (Quality Unemployment System Transformation) will be the completely re-engineered Revenue and Benefits system, providing Employers, Third Party Administrators and claimants with a fast, interactive web-enabled way to transact business with the Division of Unemployment Assistance - DUA. The scope of QUEST includes the two major systems namely, Revenue and Benefits. While the features of the Revenue system will be available from December 7 2009 for the use of Employers and Third party Administrators, the Benefits system is expected to go live in 2011.</p> <p>The scope of this user guide is limited to the Revenue System and is intended for use by Third Party Administrators accessing QUEST. If you are a Third Party Administrator, it is also recommended that you refer to the 'Employer Self Service User Guide' aimed at employers for obtaining information on employer functions. The Employer Self Service User Guide can be accessed at www.mass.gov/uima</p>
REVENUE System	<p>The DUA QUEST Revenue System will automate the Registration, Wage and Employment Reporting, Tax Calculation and Payment processes and facilitate these time-saving improvements for employers/Third Party Administrators:</p> <ul style="list-style-type: none">• Employers will be able to get complete up-to-date account information and access & maintain their accounts online, via self service.• Wage and Employment filings, UI and UHI Tax filings can be completed in a single process• Large Employers and/or Third Party Agents will be able to file electronically and process multiple records at the same time• Smaller Employers will be able to use online processing for quarterly tax filing and upload documents using specified formats• Employers and Third Party Administrators will be able to make secure online payments.
Disclaimer:	<p>The purpose of this user guide is to help the Third Party Administrators to navigate the QUEST system. It should not used as a reference for Unemployment Insurance Program policies and procedures. Please refer to the DUA website at www.mass.gov/dua for Unemployment Insurance Program Policies and Procedures or contact the DUA.</p>

LOGGING IN

Introduction

This section of the document will show how an authorized user can login to the QUEST system and navigate around QUEST. In order to be able to login to QUEST using the instructions here, you must register yourself as a Third Party Administrator. TPA Registration on the new QUEST system is mandatory for all existing and new TPA(s).

Step-by-Step Instructions:

FIRST TIME LOGIN:

The step by step instructions below should be used if you are logging in for the first time after completing the initial registration. Please refer to the set of instructions - 'LOGGIN IN', for a normal login process.

1. Go to the DUA – QUEST webpage at www.mass.gov/uima
2. Click on the link for Agent Login.
3. The following page will appear. Enter the user ID and password you received at the end of your account registration process. This information can also be retrieved from the correspondence received by US Mail, confirming your registration. Click on the link ' Login'

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Thursday, November 19, 2009 [Print](#)

Logon * Indicates Required Field

TPA Registration
What's New
System Availability
User Guide

Massachusetts Division of Unemployment Assistance : Third Party Administrator Account (TPA) Login

To access Third Party Administrator (TPA) account information, enter your User Name and Password. For purposes of authentication, using your Password is considered the same as using your signature.

User ID: *

Password: *

[Login](#) [Forgot Password](#)

Helpful Resources Home


[TPA Registration](#)
Create a new account to obtain a Third Party Administrator (TPA) Account and create a System Administrator user.

[What's New](#)
Items of current interest - law changes, etc.

[System Availability](#)
Check routine and special system downtimes.

[User Guide](#)
A guide to using the Third Party Administrator (TPA) Account Self-Service System.

4. The following page will appear. Enter the requested information and click 'Next'. (The username and password would have been displayed at the end of the registration process).



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[Change Password](#) | [Logoff](#)
* Indicates Required Field

TPA Registration

What's New

System Availability

User Guide

Third Party Administrator

TPA ID: **1001** TPA Name: **XXXX**

Reset Password

Please choose a new password and other information by entering it in the fields below and clicking save. For additional information on password security, please refer to the [password guidelines](#).

Current Password:

New Password:

Re-enter new password:

Security Question:


What is your father's middle name? *

Security Answer:

4-digit PIN Code:

Save

5. The home page for your TPA account will appear as shown below.



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[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: **100** TPA Name: **XXXX**

TPA Home

[TPA Home](#)

TPA Home

[Account Maintenance](#)

View or update TPA account information such as; Name, Organization Type, addresses and phone numbers.

[Payment Information](#)

Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function.

[User Maintenance](#)

Create new or update existing TPA user information

[Employment and Wage Detail Reporting](#)

Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function.

[Searches](#)

Search for employers for which the TPA has been assigned account access.

LOGGING IN:

1. Go to the DUA – QUEST webpage at www.mass.gov/uima
2. Click on the link for Agent login. The following page will appear. Enter your user ID and password. Click on the link 'Login'.

NOTE: If you do not have a user ID and password, please contact your system administrator.

The screenshot shows the login page for the Massachusetts Division of Unemployment Assistance. The header includes the department logo and the date 'Thursday, November 19, 2009'. A navigation menu on the left lists 'TPA Registration', 'What's New', 'System Availability', and 'User Guide'. The main content area is titled 'Massachusetts Division of Unemployment Assistance : Third Party Administrator Account (TPA) Login'. It contains instructions: 'To access Third Party Administrator (TPA) account information, enter your User Name and Password. For purposes of authentication, using your Password is considered the same as using your signature.' Below this are input fields for 'User ID:' and 'Password:', both marked with a red asterisk to indicate they are required. There are 'Login' and 'Forgot Password' buttons. At the bottom, there is a 'Helpful Resources Home' section with links to 'TPA Registration', 'What's New', 'System Availability', and 'User Guide', each with a brief description of the resource.

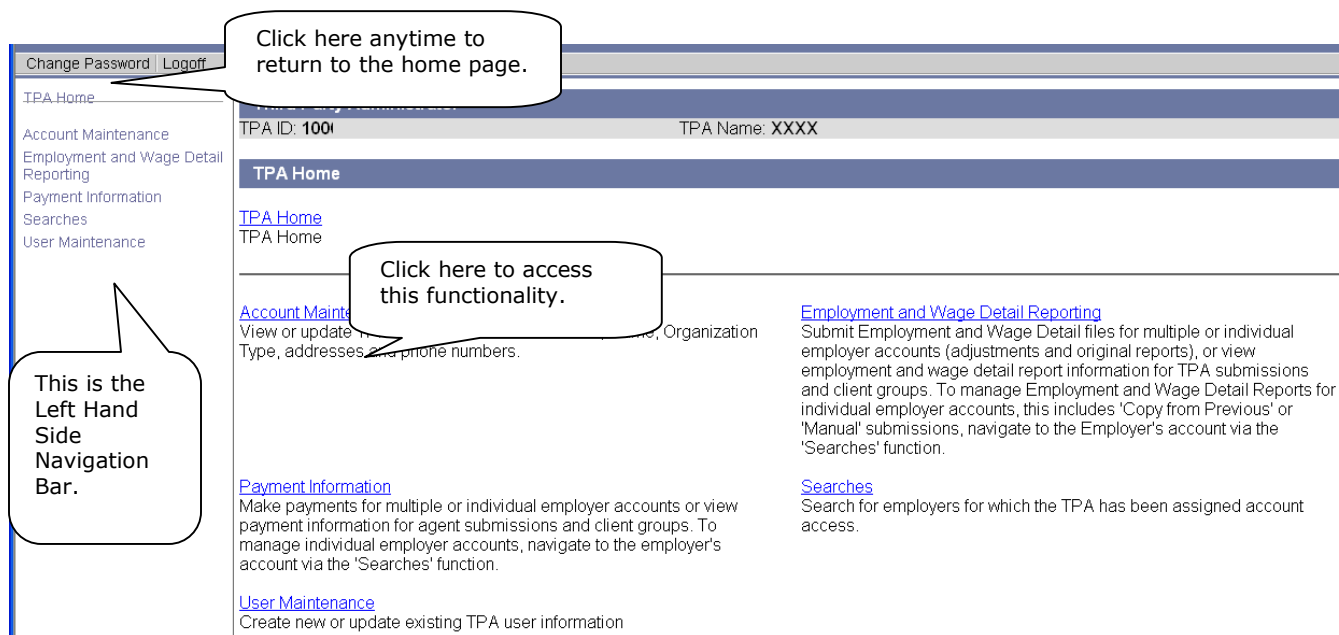
3. The TPA home page will appear as shown below.

The screenshot shows the TPA Home page. The header is identical to the login page. The navigation menu on the left includes 'TPA Home', 'Account Maintenance', 'Employment and Wage Detail Reporting', 'Payment Information', 'Searches', and 'User Maintenance'. The main content area is titled 'Third Party Administrator' and displays 'TPA ID: 1001' and 'TPA Name: XXXX'. Below this is a 'TPA Home' section with links to 'TPA Home' and 'TPA Home'. The page is divided into four columns of links and descriptions: 'Account Maintenance' (View or update TPA account information), 'Employment and Wage Detail Reporting' (Submit Employment and Wage Detail files), 'Payment Information' (Make payments for multiple or individual employer accounts), and 'Searches' (Search for employers for which the TPA has been assigned account access). There is also a 'User Maintenance' link at the bottom left.

NAVIGATION:

The following is a list of navigation tips:

1. The first page that appears after the user logs in to the system is known as the home page (screenshot below). The user can access the various functions available to him/her by clicking on the respective links. For example, If the user needs to access the Account Maintenance functions, the user will click on 'Account Maintenance' and so on. On this home page, the user will see only the functions limited to his/her security role, as enabled by the system administrator.



2. **Left Hand Side Navigation bar:** The first page that appears after the user logs in to the system is known as the home page. The left hand side navigation bar is displayed throughout the time you are logged into QUEST. This bar always lists the options available to you in the staff splash page and a drill down list of options available under the current function.
3. **Helpful hints:** Throughout the QUEST system web pages, you will find clickable links followed by a question mark. Clicking on the link will open up a new page, with additional information/definition of the phrase. For example: [Payment hierarchy?](#)

Change Password Logoff	
Employer Home FAQ/Contact Us Account Maintenance Benefit Charge Activities Correspondence Employment and Wage Detail Reporting Payment Information <ul style="list-style-type: none"> Cancel Payments Payment Account Summary Search Payments Request for 940 Certification 	<div>Third Party Administrator</div> <div>TPA ID: 100 TPA Name: XXXX</div> <div>Employer Information</div> <div>Employer Account Number: 100 Employer Name: Employer</div> <div>Statement Period: Current Quarter 2009</div> <div>Search</div> <div>Account Summary Statement Period: October, November, December (Q4) 2009</div> <ul style="list-style-type: none"> The statement below contains the transactions posted to your Unemployment Insurance Account during the identified months. Payments are applied according to the Payment hierarchy. Prior quarter debt is carried forward to the current quarter/month. Payments made are applied to the current quarter/month amount due first.

Click here for additional information on this phrase.

The definition of the phrase will appear in a separate window as shown below.

Payment Hierarchy
Payments are applied in a manner as prescribed by the Director of the Division of Unemployment Assistance.
Close

- Change Password/Log off:** The links to change password / log off are displayed throughout the time you are logged onto QUEST. Click on respective links anytime to change your password or log off the system.

Change Password Logoff	
Employer Home FAQ/Contact Us Account Maintenance Benefit Charge Activities Correspondence Employment and Wage Detail Reporting Payment Information <ul style="list-style-type: none"> Cancel Payments Payment Account Summary Search Payments Request for 940 Certification 	<div>Third Party Administrator</div> <div>TPA ID: 100 TPA Name: XXXX</div> <div>Employer Information</div> <div>Employer Account Number: 100 Employer Name: Employer</div> <div>Statement Period: Current Quarter 2009</div> <div>Search</div> <div>Account Summary Statement Period: October, November, December (Q4) 2009</div> <ul style="list-style-type: none"> The statement below contains the transactions posted to your Unemployment Insurance Account during the identified months. Payments are applied according to the Payment hierarchy. Prior quarter debt is carried forward to the current quarter/month. Payments made are applied to the current quarter/month amount due first.

TPA REGISTRATION

Introduction	If you are an agent authorized to conduct business on behalf of an employer who is registered with the DUA, you must register yourself with the DUA as a Third Party Administrator (TPA). Registration is required, even if you are an existing TPA already conducting business with the DUA. Please follow the step by step instructions below for registering as a TPA. If you are a TPA operating with employees working or living within Massachusetts, you must register as an employer with the DUA using the process for registering employers.
Helpful Hints	The person completing the registration process for your TPA account will be the System Administrator for the account and will have access to all information in the account. The system administrator will be able to view information, make changes, complete transactions, and give online access to other users in this account. Therefore, the person chosen to register the account should be a highly trusted representative of your firm.

Step-by-Step Instructions:

1. Go to the Massachusetts Unemployment Insurance webpage at www.mass.gov/uima
2. Click on the link for Agent login.
3. The following webpage will appear. Click on the link 'TPA Registration'.

The screenshot shows the 'Massachusetts Division of Unemployment Assistance : Third Party Administrator Account (TPA) Login' page. The page includes a header with the 'Massachusetts Department of Workforce Development' logo and the date 'Thursday, November 19, 2009'. A navigation bar contains links for 'Ligon', 'TPA Registration', 'What's New', 'System Availability', and 'User Guide'. The main content area has a login form with fields for 'User ID' and 'Password', both marked with a red asterisk to indicate they are required. Below the form are 'Login' and 'Forgot Password' buttons. A 'Helpful Resources' section is at the bottom, with a callout bubble pointing to the 'TPA Registration' link. The 'TPA Registration' link is described as 'Create a new account to obtain a Third Party Administrator (TPA) Account and create a System Administrator user.' Other resources include 'What's New' (Items of current interest - law changes, etc.) and 'User Guide' (A guide to using the Third Party Administrator (TPA) Account Self-Service System).

4. The following page will appear. Enter the information necessary to complete registration and continue to click 'Next' to continue with registration.

Loton		* Indicates Required Field
TPA Registration What's New System Availability User Guide	Register as a Third Party Administrator (TPA)	
	Enter information to register as a TPA and to obtain login information. This will allow the TPA to act on behalf of another employer after the employer has granted access rights; the employer will have to update their account with the TPA ID code and assign the TPA access to specific employer functions before a TPA may perform those functions.	
	If you are attempting to register as a Fiscal Intermediary (FI), please contact UI Staff.	
	If you exit this application prior to submission your information will not be saved.	
	TPA Name: <input type="text"/> *	
	Attention: <input type="text"/>	
	Address Line 1: <input type="text"/> *	
	Address Line 2: <input type="text"/>	
	City: <input type="text"/> *	
	State: <input type="text" value="MA - Massachusetts"/>	
Zip Code: <input type="text"/>		
Country: <input type="text" value="US - United States Of America"/> *		
Phone: <input type="text"/> ext: <input type="text"/>		
International Phone: <input type="text"/>		
Fax: <input type="text"/>		
International Fax: <input type="text"/>		
EMail: <input type="text"/> *		
Organization Type: <input type="text" value="Select one"/> *		
Enter Initial User Information		
As initial user, please enter your first and last name:		
First Name: <input type="text"/> *		
Last Name: <input type="text"/> *		
Enter Federal Employer Identification Number		
Enter the Federal Employer Identification Number (FEIN):		
TPA FEIN: <input type="text"/> *		
Enter Employer Account Number		
If you are currently registered as a Massachusetts (MA) employer please enter your MA Employer Account Number(EAN).		
MA Employer Account Number: <input type="text"/>		
<div style="text-align: right;"> <input type="button" value="Next"/> <div style="border: 1px solid black; border-radius: 15px; padding: 5px; display: inline-block;">Click here</div> </div>		

- After you have entered all the necessary information, you will be asked to confirm your submission. Click on 'Submit' to confirm.

Loton		Tuesday, September 15, 2009 Print
TPA Registration What's New System Availability User Guide	Confirm TPA Registration	
	Please review the following information. Select the Previous button to make any updates to the record.	
	If no changes are required choose the Submit button.	
	Please print this page for your own records.	
	TPA Name: TPA	
	Address: 19 Staniford St Boston, MA 02114-2502 United States Of America	
	Phone: 617-000-0000 ext:	
	EMail: tpa@detma.org	
	Organization Type: Other	
	Initial User	
First Name: TPA		
Last Name: MA		
Employer Account Number		
MA Employer Account Number:		
TPA FEIN: <input type="text"/>		
Address Information		
All correspondence from the Division will be mailed to the above address. Once the account has been established the address may be modified or additional addresses added by logging in to the account and selecting the Account Maintenance.		
<div style="text-align: right;"> <input type="button" value="Modify"/> <input type="button" value="Submit"/> </div>		

5. Upon confirmation, a page will be displayed with your TPA account ID and username/password to access the system. The registration process is complete. From here you can click on the link 'Login' if you wish to access the system. Please refer to the section 'Logging In and Navigation' for instructions on logging in.

NOTE: You will receive a letter by U.S. mail confirming your registration. You may also print this page for your records and/or continue with the login process.

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Workforce
Development

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Logon

TPA Registration
What's New
System Availability
User Guide

Login Information

You have successfully registered as a Third Party Administrator in this system.

You will need to provide your TPA ID to employers to gain access to their assigned functions.

User ID: **tk501**

Password: **8181**

TPA ID: **100**

Additional Information

If you did not enter a valid email address during registration, you will not receive file upload confirmations.

Activation Complete

Thank you for providing this information. You have successfully initiated your online, self-service account. Please click the Login button to perform system functions, including the following:

- Create your permanent password
- View existing account information
- Manage account(e.g. enter additional addresses, assign roles, create units)

Login

TPA Account Maintenance

TPA ACCOUNT PROFILE

Introduction

This section of the document will explain how an authorized user can modify a TPA profile. The account profile elements that can be modified under this maintenance activity are: TPA name, Organization type.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the instructions in the section 'Logging In'.
2. Click on the link 'Account Maintenance'. The Account maintenance home page will appear as shown below.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
<ul style="list-style-type: none"> Account Profile Address Information 	Account Maintenance
Employment and Wage Detail Reporting	Account Profile View or update TPA account information such as: Name, Organization Type, addresses and phone numbers
Payment Information	Address Information Update or create additional address types. Maintain phone numbers and e-mail addresses.
Searches	
User Maintenance	

3. Click on 'Account Profile'. The page shown below will appear. Enter your changes as necessary and click on 'Save'.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
<ul style="list-style-type: none"> Account Profile Address Information 	Account Profile
Employment and Wage Detail Reporting	TPA ID: 100
Payment Information	TPA Name: <input type="text" value="xxxx"/>
Searches	Employer Account Number: <input type="text"/>
User Maintenance	FEIN: 1000
	Organization Type: <input type="text" value="Other"/>
	<input type="button" value="Save"/>

4. Your account profile will be updated.

TPA ADDRESS INFORMATION

Introduction

This section of the document will explain how an authorized user can view the address information on a TPA account and modify it when necessary. You will also be able to modify your preferred email address for communication here. A TPA account can have up to four different types of addresses and they are: Headquarters, Mailing, Wage & Separation and Benefits Charge. The addresses provided for each type will be used as the mailing address for correspondences related to the address type.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the instructions in the section 'Logging In'.
2. Click on the link 'Account Maintenance'. The Account maintenance home page will appear.
3. Click on 'Address Information' to view /modify the address on the TPA account. The page shown below will appear.
NOTE: If you wish to view the address history associated with the account, click on the link 'View TPA Address History'.

The screenshot shows the 'Third Party Administrator' interface. On the left is a navigation menu with links: TPA Home, Account Maintenance (sub-linked to Account Profile and Address Information), Employment and Wage Detail Reporting, Payment Information, Searches, and User Maintenance. The main content area displays 'TPA ID: 100' and 'TPA Name: XXXX'. Below this is the 'Address Information' section with a 'Select the Address Type' dropdown and a table of address types. Callouts indicate: 'Click here to view /update this address type.' pointing to the dropdown; 'Click here to view history.' pointing to the 'View TPA Address History' link; and 'Click here to change your email address.' pointing to the 'Update Email Preference' link.

Address Type	Address	City	State	Zip Code	Employer/TPA
Headquarters					
Mailing	19 Staniford Street	Boston	MA	02135	XXXX
Wage and Separation					
Benefits Charge					

[View TPA Address History](#)
[Update Email Preference](#)

4. **Changing address:** On the screen shown above, click on the address type (for example: 'Mailing') to view/modify the address. The following page will appear. Upon completion of your changes, click on 'Save'.

Change Password Logoff		* Indicates Required Field	
TPA Home Account Maintenance Account Profile Address Information Employment and Wage Detail Reporting Payment Information Searches User Maintenance	Third Party Administrator TPA ID: 100 TPA Name: XXXX		
	Modify Address Enter address information below and click 'Save'.		
	Address Type: Mailing		
	Attention: <input type="text"/>		
	Address Line 1: <input type="text"/> *		
	Address Line 2: <input type="text"/>		
	City: Boston *		
	State: <input type="text"/> MA - Massachusetts		
	Zip Code: <input type="text"/> 02135		
	Country: <input type="text"/> US - United States Of America *		
Phone: <input type="text"/> 6170000000 ext: <input type="text"/>			
Fax: <input type="text"/>			
Email: <input type="text"/> zz@detma.org			
<input type="button" value="Previous"/> <input type="button" value="Save"/>			

The email address here is used only as secondary information. You primary email will be used for sending all email communications.

You will be asked to confirm the address change. Confirm by clicking on 'Submit'. The address change is complete.

- Changing email address:** Click on the link 'Update Email Preference' shown in step 4. The following page will appear. Enter your contact email and click 'Submit' to update your changes.

Change Password Logoff	
TPA Home Account Maintenance Account Profile Address Information Employment and Wage Detail Reporting Payment Information Searches User Maintenance	Third Party Administrator TPA ID: 100 TPA Name: XXXX
	Email Preference Enter your contact email address. This address will serve as your main point of contact for all communication with this Agency.
	Contact Email: <input type="text"/>
	<input type="button" value="Cancel"/> <input type="button" value="Submit"/>

Payment Information

Introduction

The TPA will be able to make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups from the 'Payment Information' page accessed from the TPA home page. In order to manage the employer account individually and perform other payment related functions on behalf of the employer, you must navigate to the employer's account via the 'Searches' function. Please refer to the 'Searches/Employer Account Home' section of this user guide for instructions to access the employer account home page. In addition, refer to the 'Employer Self Service User Guide' for information on employer payment functions.

IMPORTANT: Your TPA account must have the required roles (security access) in order to perform Payment Update and Submit functions, for each assigned employer account. You must contact the employer you are servicing to get these roles assigned to you; if you are not pre-authorized to self assign these roles.

NAVIGATING TO PAYMENTS

Introduction

This section of the document will show how you can navigate to the payment home page.

Step-by-Step Instructions:

1. Login to your TPA account. The TPA home page will appear as shown below. Click on the link 'Payment Information'.

Change Password Logout	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	
Employment and Wage Detail Reporting	TPA Home
Payment Information	TPA Home
Searches	TPA Home
User Maintenance	
Account Maintenance	Assign TPA Role
View or update TPA account information such as; Name, Organization Type, addresses and phone numbers.	Submit client(s) for assign payment roles
Employment and Wage Detail Reporting	Payment Information
Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function.	Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function.
Searches	User Maintenance
Search for employers for which the TPA has been assigned account access.	Create new or update existing TPA user information

Click here to access payments home page.

- The payments home page will appear as shown below. Click on the payment function you wish to access.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information <ul style="list-style-type: none"> • Download Payment Due File • Cancel Payments • Review Employer Accounts • Search Payments • Payment Options Searches User Maintenance	<div> Third Party Administrator TPA ID: 100 TPA Name: XXXX </div> <div> Payment Information Download Payment Due File Download a Payment Due File of employers assigned to you with debt.. </div> <div> Cancel Payments List of all unprocessed electronic payments and provides the option for cancelling a payment. </div> <div> Review Employer Accounts Search for employer accounts assigned to you by employer name or account number. You may also identify all accounts with an outstanding balance. </div> <div> Search Payments Displays processed and cancelled payments by confirmation number, payment method or date range. </div> <div> Payment Options Review, modify, and make a payment. </div>

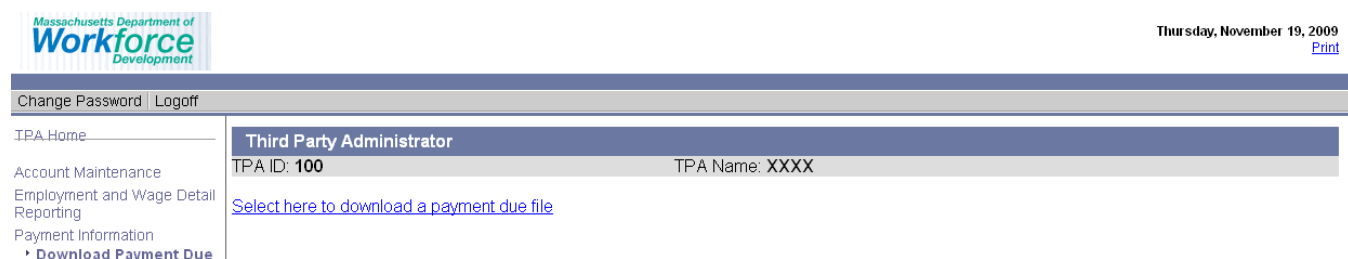
DOWNLOAD PAYMENT DUE FILE

Introduction

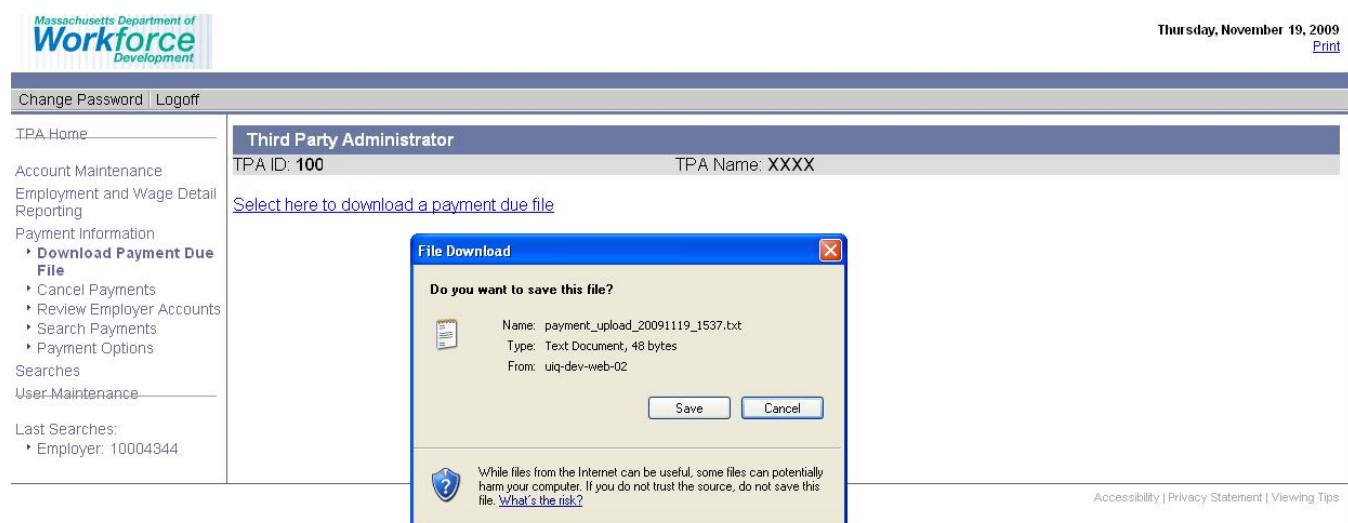
This section of the document will show how an authorized user can download the payment due file. The downloaded file will contain all employers assigned to the TPA account with corresponding amounts due. You will be able to use this file to view the payments due for each employer as well as to make payments towards multiple employer accounts at once. For additional information on uploading this file in order to make payments refer to the section on 'Payment Options'.

Step-by-Step Instructions:

1. Navigate to the payment home page using the instructions provided in the section – 'Navigating to payments'.
2. Click on the link 'Download Payment Due File'. The following page will appear. Click on the link on this page to download the file.



3. The following pop-up window will appear. Click on 'Save' and follow the prompts to download and save the file to your local folder.



4. Open the file from your local folder. It will be in the below format. The file layout of the downloaded bulk payment file is as follows:

TPA ID, Download Date, Record Count (*header row*)

Employer Account Number, Total Amount Due, Current Quarter Due (*Record 1*)

Employer Account Number, Total Amount Due, Current Quarter Due (*Record 2*).....and so on.

PAYMENT OPTIONS

Introduction

This section of the document will show how an authorized user can make payments from their TPA account on behalf of their assigned employer accounts. There are several methods to make the payments and they will be explained in the step by step instructions.

Step-by-Step Instructions:

Payment Option Home Page:

1. Navigate to the payment home page using the instructions provided in the section – ‘Navigating to payments’.
2. Click on the link ‘Payment Options’. The following page will appear. This page will provide all the available methods to make payments. It will also provide links to edit/delete any previously entered payment details that are in progress. (not shown in the screenshot).

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[Change Password](#) | [Logout](#)

TPA Home

Account Maintenance

Employment and Wage Detail Reporting

Payment Information

- Download Payment Due File
- Cancel Payments
- Review Employer Accounts
- Search Payments
- Payment Options**

Searches

User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Payment Options


- [Make full payment for all assigned employers](#) \$1,391.64
- [View all employers and enter payment information online per employer](#) (including current quarter)
- [Download payment due file](#)
- Upload payment application file (.txt)

[Download/Upload file instructions](#) ®

Method 1:

1. Click on the link ‘View all employers and enter payment information online per employer’. The following page will appear, listing all the employer accounts (up to 100) associated to your TPA account, with payments due. On this screen you also have the option to search for specific employer(s) using search criteria, if you wish to locate specific employer(s). Enter all the information

required to complete the payment. Please refer to the screenshot below for additional information on entering payment details.



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Third Party Administrator

TPA ID: 100
TPA Name: XXXX

Search Employers

Employer Name:
Employer Account Number:
Employer Account Status: Select one
Display Accounts With Amount Due Only: ☐
Display Accounts With Payment Amount Errors (overpaid): ☐

Edit Assigned Employer Accounts

First 100 records are shown. To edit specific employers, search above.

Employer Name	Employer Account Number	Employer Current Quarter/Month Amount Due	Employer Total Amount Due	Payment Amount
Employer	1000	\$1,399.68	\$1,391.64	<input type="text" value="\$1,391.64"/>

Out of 1 Employers assigned to you a payment submitted now would total \$0.00 for 0 employers.

[Enter Current Quarter/Month Amount Due for all Employers](#)
[Enter Total Amount Due for all Employers](#)
[Clear All Employer Payment Amounts](#)

Select "Previous" to return to payment options.
Select "Save" to update the total payment amount above and per Employer.
Select "Submit" to continue with payment submission.
Select "Home" to exit this process.

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Click here to view this employer's payment account summary.


The links here will help you enter frequently used values for payment amounts.

Click here to save and return later.

2. Click on 'Submit' to proceed to the next step.

3. The following page will appear, displaying the payment you are about to make. Click 'Next' to proceed.

NOTE: The only payment method available on this screen is ACH Debit. Click on the link on this page for additional information on getting set up for making payments via ACH Credit.



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Third Party Administrator

TPA ID: 100
TPA Name: XXXX

1 →
2 →
3 → COMPLETE

Review Balance
Select Payment Method
Submit Payment Details

Payment Method

Contributory Employer Due Dates:

Quarter 1 - April 30
Quarter 2 - July 31
Quarter 3 - October 31
Quarter 4 - January 31

Reimbursable Employer Due Dates:
30 calendar days from the mailing of the bill

If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Amount Due: **\$100.00**
Payment Amount: **\$100.00**
Payment Method: ACH Debit *

If you intend to submit payment by the ACH Credit method of payment, please [select here](#) before you proceed.

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- The following page will appear where you will be able to enter the bank information. After entering, click 'Next' to continue.

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★ Indicates Required Field

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Third Party Administrator
TPA ID: 100

TPA Name: XXXX

1
Review Balance

2
Select Payment Method

3
Submit Payment Details

COMPLETE

ACH Payment

Quarter 1 - April 30
Quarter 2 - July 31
Quarter 3 - October 31
Quarter 4 - January 31

Contributory Employer Due Dates:

Reimbursable Employer Due Dates: 30 calendar days from the mailing of the bill
If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Amount Due: \$100.00
Payment Amount: \$100.00
Routing Transit Number: ★
Bank Account Number: ★
Account Type: ★
Payment Effective Date: 11/19/2009

Your [Routing Transit Number](#) and [Bank Account Number](#) are located on the paper checks provided by your bank.

Previous

Next

- On the next page, the payment verification will be displayed. Click 'Submit' to confirm the payment. Click on 'Previous' to make changes.
- The following confirmation will appear, indicating that your payment is complete. This screen will also present you the option of saving your bank information for future payments. Follow the prompts to save your bank information.

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Third Party Administrator
TPA ID: 100

TPA Name: XXXX

1
Review Balance

2
Select Payment Method

3
Submit Payment Details

COMPLETE

Payment Confirmation

Agent Name: XXXX
Effective Date: 11/19/2009
Transaction Date: 11/19/2009
Transaction Time: 6:23 PM
Remaining Balance: \$0.00

Agent Account Number: 100
Payment Confirmation #: 500174428
Payment Method: ACH Debit
Total Payment Amount: \$100.00

Would you like to save this bank information for future payments?
If you have a remaining balance you may make another payment by selecting "Make Payment"

Yes

22

Method 2:

Under this method the user uploads a file with the employer account number and the payment amounts. This allows the user to work offline for entering the payment amounts, for multiple payments. In order to make payments using the file upload method, you must download the payments due file first. Please refer to the section 'Download Payments Due File' for instructions on downloading this file. After downloading the file, you will be able to review the payments due and edit the 'payment due' values on the downloaded file which will be treated as 'payment amount' when the file is uploaded to make payments.

1. Navigate to the payment options home page using the instructions provided in the beginning of this section.
2. Locate the file on your local folder using the 'Browse' button. Click on 'Submit' to upload the file.
3. The following page will appear with the upload status. Click on the link 'Make Payment' to continue with the payment.

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TPA Home Account Maintenance Employment and Wage Detail Reporting Payment Information <ul style="list-style-type: none"> ▶ Download Payment Due File ▶ Cancel Payments ▶ Review Employer Accounts ▶ Search Payments ▶ Payment Options 	<div style="background-color: #4a69bd; color: white; padding: 5px;">Third Party Administrator</div> <div style="background-color: #d3d3d3; padding: 5px;"> TPA ID: 100C... TPA Name: XXXX </div> <div style="background-color: #4a69bd; color: white; padding: 5px;">Upload Complete</div> <table style="width: 100%;"> <tr> <td style="text-align: center;">Successful Records: 1</td> <td style="text-align: right;">Payment Amount: \$100.00</td> </tr> <tr> <td style="text-align: center;">Rejected Records: 0</td> <td style="text-align: right;">File Size: 46 bytes</td> </tr> <tr> <td style="text-align: center;">Upload Date: 11/19/2009</td> <td style="text-align: right;">Upload Time: 7:03:35 PM EST</td> </tr> </table> <div style="text-align: center; margin-top: 10px;"> Home Make Payment </div>	Successful Records: 1	Payment Amount: \$100.00	Rejected Records: 0	File Size: 46 bytes	Upload Date: 11/19/2009	Upload Time: 7:03:35 PM EST
Successful Records: 1	Payment Amount: \$100.00						
Rejected Records: 0	File Size: 46 bytes						
Upload Date: 11/19/2009	Upload Time: 7:03:35 PM EST						

4. From here, the process is the same as Method 1. Continue to step 3 of method 1 for instructions to complete the payment.

Method 3:

Under this method, you will be able to make only the full payment due on all your assigned employer accounts. You will not be able to make any changes to the payment amounts or remove some of the employer accounts.

1. Navigate to the payment options home page using the instructions provided in the beginning of this section.
2. Click on the link ' Make Full Payment for all assigned employers'
3. The following page will appear, showing the full amounts due. From here on, the process is same as Method 1. Continue to step 3 of method 1 for instructions to complete the payment.



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* Indicates Required Field

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[Last Searches:](#)

▸ Employer: 10004344

Third Party Administrator

TPA ID: 100049

TPA Name: XXXX



Payment Method

Quarter 1 - April 30

Quarter 2 - July 31

Contributory Employer Due Dates: Quarter 3 - October 31

Quarter 4 - January 31

Reimbursable Employer Due Dates: 30 calendar days from the mailing of the bill

If payment is not submitted by the date indicated, you may be subject to interest or penalties.

Amount Due: \$1,191.92

Payment Amount: \$1,191.92

Payment Method: ACH Debit *

If you intend to submit payment by the ACH Credit method of payment, please [select here](#) before you proceed.

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[Next](#)

SEARCH PAYMENTS/TRANSFER PAYMENTS

Introduction

This section of the document will show how an authorized user can search for payments and view their status. You will be able to view processed and cancelled payments by confirmation number, payment method or date range. It is also possible to transfer payments from one of your assigned employer account to another, if you realize that a payment has been made to the wrong employer account. The payment can be transferred irrespective of processing status, as long as the 'transfer from' and 'transfer to' employers are assigned to your TPA account with the appropriate payment roles.

Step-by-Step Instructions:

1. Navigate to the payment home page using the instructions provided in the section – 'Navigating to payments'.
2. Click on the link 'Search Payments'. The following page will appear. Enter your search criteria and click on 'Search'.

Massachusetts Department of Workforce Development

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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Search Payments

Confirmation Number: Method:

Min \$: Max \$:

Status:

Transaction Date: From: To:

[Search](#) [Reset](#) [Home](#)

3. The search results will appear as shown below. Click on the confirmation number to view additional payment details.

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User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Search Payments

Confirmation Number: Method:

Min \$: Max \$:

Status:

Transaction Date: From: To:

[Search](#) [Reset](#)

Search Results

Confirmation Number	Deposit Number	Transaction Date	Method	Status	Amount
500174465		11/20/2009	ACH Debit	Submitted	\$100.00

[Home](#)

Click here to view payment details.

4. The payment details will appear as shown below. Click on the employer account number to view additional payment detail from within the employer account.

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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Payment Detail

Confirmation Number: 500174465 Transaction Date: 11/20/2009

Payer ID: 100051 Payer Type: Agent

Payment Method: ACH Debit Status: Submitted

Payment Amount: \$100.00 Items in Payment: 1

Employer Payment Items

Employer Account Number	Employer Name	Amount
10004344	Employer	\$100.00

Click here to view additional details /transfer this payment.

[Previous](#)

5. **Transfer Payment:** Follow steps 1 through 4. The employer account from where you are viewing the payment details will default as the 'transfer from' employer account. Click on the 'Transfer' button.

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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Employer Information [Change Employer](#) [Leave Employer](#)

Employer Account Number: 1000 Employer Name: Employer

Payment Detail

Confirmation Number	Receipt Date	Posting Date	Method	Description	Amount
500174465	11/20/2009		ACH Debit	Account XXXX0789900 Paid by Agent	\$100.00

[Transfer](#)

Payment Distribution

Debt Posting Date	Sub-Account	Quarter / Year	Amount Applied
7/31/2009	UI Contributions Principal	3/2009	\$100.00
		Total	\$100.00

[Previous](#)

6. The following page will appear. You will be able to search for the 'transfer to' employer account from here. Enter your search criteria and click on 'Search'.

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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Employer Information [Change Employer](#) [Leave Employer](#)

Employer Account Number: 100 Employer Name: Employer

Transfer Payment To

Employer Search

Employer Account Number: Employer Name:

FEIN: Phone:

[Search](#) [Reset](#)

7. The search results will appear. Click on the employer account number to transfer you wish to transfer the payment to and click 'Next'

8. The following page will appear. Enter your reason for the transfer in the 'Notes' section and click 'Submit'.

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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Employer Information [Change Employer](#) [Leave Employer](#)

Employer Account Number: 1000 Employer Name: Employer

Transfer Payments From

Confirmation Number	Employer Account Number	Employer Name	Payment Date	Payment Method	Payment Amount
500174465	100	Employer	11/20/2009	ACH Debit	\$100.00

Transfer Payment To

Employer Account Number: 100 Employer Name: 052808

Notes

[Previous](#) [Submit](#)

9. The following confirmation will appear, indicating that the transfer is complete.

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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Employer Information [Change Employer](#) [Leave Employer](#)

Employer Account Number: 100 Employer Name: Employer

Payment Transferred

Employer Payment #500174465 for \$100.00 has been transferred from Employer Account Number 100 to Employer Account Number 1000.

[Accessibility](#) | [Privacy Statement](#) | [Viewing Tips](#)

REVIEW EMPLOYER ACCOUNTS/PAYMENT ACCOUNT SUMMARY

Introduction

This section of the document will show how an authorized user can search and review the payment account summary for the assigned employer accounts.

Step-by-Step Instructions:

1. Navigate to the payment home page using the instructions provided in the section – 'Navigating to payments'.
2. Click on the link 'Review Employer Accounts'. The following page will appear. Enter your search criteria and click on 'Search'.

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- Download Payment Due File
- Cancel Payments
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Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Search Employers

Employer Name:

Employer Account Number:

Employer Account Status:

Display Accounts With Amount Due Only: ☐

[Search](#) [Reset](#)

3. The following page will appear, displaying the employer accounts you searched for along with the payments due details for the current quarter and total amounts due. Click on the employer name to view additional details on the payments due and to view the quarterly account summary page.

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- Download Payment Due File
- Cancel Payments
- Review Employer Accounts**
- Search Payments
- Payment Options

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User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Search Employers

Employer Name:

Employer Account Number:

Employer Account Status:

Display Accounts With Amount Due Only: ☐

[Search](#) [Reset](#)

Review Assigned Employer Accounts

Employer Name	Employer Account Number	Employer Current Quarter/Month Amount Due	Employer Total Amount Due	Status
Employer	10004344	\$1,404.99	\$1,907.33	Active

[Home](#)

Clicking here will take you to the employer payment account summary

4. The payment account summary for the employer account will appear as shown below.

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Cancel Payments

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Employer Information

Employer Account Number: 100 Employer Name: Employer

Change Employer Leave Employer

Statement Period: Current Quarter 2009

Search

Account Summary Statement Period: October, November, December (Q4) 2009

- The statement below contains the transactions posted for the current quarter.
- Payments are applied according to the [Payment hierarchy](#).
- Prior quarter debt is carried forward to the current quarter.
- Payments made are applied to the current quarter/monthly amount due first.
- To review quarterly charges, view [Quarterly Summary](#).
- To Preview future interest charges, view [Interest Calculator](#).

Click here to view quarterly summary.

Click here to access Interest Calculator

Item	Amount
All Financial Transactions	
Outstanding Balance	\$810.38
Payments Received	\$208.04
UI Contributions	\$253.94
Other Charges	\$400.00
UIH Contributions	\$0.00
Interest	\$93.26
Penalties	\$100.00
Amount Due	\$1,449.54

Credits will be applied to future amounts due.

The clickable links here take the user to a new page where additional details on the item can be viewed.

Use the drop-down menu to choose a different year/quarter for which you wish to see the statement. Click 'Search'.

Viewing Quarterly Summary: The quarterly summary page can be viewed using the link shown in step 4. The page will appear as shown below. This provides a summary view of contributions, payments etc. due for chosen quarter only. The difference from the account summary statement is that it does not include balances due from previous quarters.

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Cancel Payments

Payment Account Summary

Search Payments

Request for 940 Certification

Request Payment Plan

User Maintenance

Employer Information

Employer Account Number: 100 Employer Name: Employer

Quarterly Calculations Search

Statement Period: October, November, December (Q4) 2009

Search

Quarterly Summary

Contributions, Charges, Penalties and Interest

Item	Amount Due
Penalties	\$0.00
Interest	\$0.00

Balance Summary

Item	Amount Due
Quarterly/Monthly Total Amount	\$0.00
Payment Applied	\$0.00
Outstanding Balance	\$0.00

Review your charges or payments via the links to the left.

Previous

Interest Calculator: The interest calculator can be accessed as shown in step 4. The page will appear as shown below. On this screen, the user will be able to calculate the interest due on all outstanding balances. (Interest cannot be calculated for a past/future quarter for which contribution calculations do not exist already).

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Workflow - My Inbox

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Payment Information

- Cancel Payments
- Payment Account Summary
- Search Payments
- Request for 940 Certification
- Request Payment Plan

User Maintenance

Employer Information

Employer Account Number: 1001

Future Calculation End Date:

Enter the future date up to which interest should be calculated and click 'Calculate' at the bottom.

The interest calculated for each quarter is displayed here.

Calculation Details - UI

Year	Month/Quarter	Program	Principal	Interest	Total
2009	Q1	UI	\$96	\$0.03	\$96.03
2009	Q2	UI	\$283	\$0.09	\$283.09
Total:					\$379.12

Calculation Details - WTF

Year	Month/Quarter	Program	Principal	Interest	Total
2009	Q1	WTF	\$60.00	\$0.02	\$60.02
2009	Q2	WTF	\$60.00	\$0.02	\$60.02
Total:					\$120.04

Program Totals

Total Penalties:	\$0.00
Unpaid Interest:	\$79.10
Program Total UI:	\$379.12
Program Total WTF:	\$120.04
Total Liability:	\$578.26

Total unpaid interest displayed here.

Our records indicate you have not submitted a employment and wage report for

Year	Quarters
2008	2,3,4

The information displayed does not include any potential penalties or future liabilities.

Make Payment Calculate

Employment & Wage Detail Reporting

Introduction

The TPA will be able to submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups, from the Employment and Wage Detail Reporting functions accessed via the TPA home page. To manage Employment and Wage Detail Reports for individual employer accounts, including, 'No employment and wage detail Report' 'Copy from Previous' or 'Manual' submissions, you must navigate to the Employer's account via the 'Searches' function. Please refer to the 'Searches/Employer Account Home' section of this user guide for instructions to access the individual employer account. In addition, refer to the 'Employer Self Service User Guide' for information on employer functions related to employment and wage detail reporting.

IMPORTANT: Your TPA account must have the required roles (security access) in order to perform Wage Detail Update and Submit functions, for each assigned employer account. You must contact the employer you are servicing to get these roles assigned to you, if you are not pre-authorized to self assign these roles.

NAVIGATING TO EMPLOYMENT & WAGE DETAIL HOME

Introduction

This section of the document will show how you can navigate to the employment and wage detail home page.

Step-by-Step Instructions:

1. Login to your TPA account. The TPA home page will appear as shown below. Click on the link 'Employment and Wage Detail Reporting'.

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TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

TPA Home

TPA Home

TPA Home

Account Maintenance

View or update TPA account information, including TPA ID, Type, addresses and phone numbers.

Employment and Wage Detail Reporting

Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function.

Click here to access employment and wage detail home.

Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function.

Searches

Search for employers for which the TPA has been assigned account access.

User Maintenance

Create new or update existing TPA user information

Payment Information

- The employment and wage detail home page will appear as shown below. Click on the function you wish to access, from here.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	
Employment and Wage Detail Reporting	Employment and Wage Detail Reporting
<ul style="list-style-type: none"> Submit Employment and Wage Detail File Submit Employment and Wage Detail File for Quarters Prior to 2010 View Employer History View Submission History 	<p>Submit Employment and Wage Detail File Submit a Wage Detail file for delinquent, current, or adjusted quarters containing one or many Employer accounts. TPAs must have security access to Wage Detail Update and Submit for each Employer account submitted.</p> <p>Submit Employment and Wage Detail File for Quarters Prior to 2010 For quarters prior to 2010, submit a Wage Detail file for delinquent, current, or adjusted quarters containing one or many Employer accounts. TPAs must have security access to Wage Detail Update and Submit for each Employer account submitted.</p> <p>View Employer History View individual Employer history; this includes quarter and year, gross wages, and amount due.</p> <p>View Submission History View submission history by date range for original and adjusted wage detail reports. The data includes the Submission Date and Time, Filing Method, and Error information.</p>
Payment Information	
Searches	
User Maintenance	

SUBMIT EMPLOYMENT AND WAGE DETAIL FILE

Introduction	<p>This section of the document will show how an authorized user can submit employment and wage detail files for assigned employer accounts. If you wish to submit employment and wage details for quarters prior to 2010, please refer to the 'Submit Employment and Wage Detail File for Quarters prior to 2010' section of this user guide. The instructions here are applicable only if you are using the 'File Upload method' for multiple employers. If you wish to submit employment and wage detail reports using any other method from the individual employer account, please refer to the 'Employment and Wage Detail Reporting section' of the Employer User Guide.</p> <p>IMPORTANT: In order to understand the process flows, key business rules and changes, security, error handling and for extensive detail on processing Employment and Wage Detail through the new QUEST system, please refer to the addendum: Employment and Wage Detail Guidelines and Information.</p>
File Upload method:	<p>Within the file upload method, 3 options are available. They are: ICESA, EFW2 and Delimited. Key facts about file upload method are:</p> <ul style="list-style-type: none"> • The file upload method can be used to process up to 10,000 records. If you have more than 10,000 records, the FTP method should be used. • The uploaded wage detail files would be processed immediately, if your file size is within 200 records. Otherwise, your file would be processed as part of a scheduled batch. You should be able to view the status of your submission the following day, using the link 'View Submission History'. • The process to upload files using ICESA, EFW2 or Delimited is similar with the only difference being in the file format. Please refer to the addendum for additional information and extensive detail on file format, data definitions, formatting and file generation instructions for each of these formats.

Step-by-Step Instructions:

1. Navigate to the employment and wage detail home page using the instructions provided in the section 'Navigating to employment and wage detail home'.
2. Click on the link 'Submit Employment and Wage Detail File'. The following page will appear. Choose from one of the file upload methods and click 'Next'. (For the purposes of illustration, the 'Delimited' option is chosen here.)

[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance
Employment and Wage Detail Reporting

- ▶ Submit Employment and Wage Detail File
- ▶ Submit Employment and Wage Detail File for Quarters Prior to 2010
- ▶ View Employer History
- ▶ View Submission History

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100

TPA Name: XXXXXX

Employment and Wage Detail Submission Process



File Format

- For details related to the most current file formats, select the appropriate link below.
- For details related to multiple file submissions or third party administrators (TPA) filings, click [here](#)®

File Type	Record Length	File Extension
<input checked="" type="radio"/> Delimited ® (i.e., export from Excel with a comma delimiter)	Variable	.bt or .csv
<input type="radio"/> ICESA ® (NASWA Standard File Format)	275	.bt
<input type="radio"/> EFW2 ® (Formerly MMREF-SSA)	512	.bt

[Next](#)

3. The following page will appear. Use the 'Browse' button to locate the employment and wage detail file from your local folder. Click on 'Next' to upload the file.

<http://www.mass.gov/>[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance
Employment and Wage Detail Reporting

- ▶ Submit Employment and Wage Detail File
- ▶ Submit Employment and Wage Detail File for Quarters Prior to 2010
- ▶ View Employer History
- ▶ View Submission History

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100

TPA Name: XXXXXX

Employment and Wage Detail Submission Process



Select Wage Detail File

Choose file by selecting the 'Browse' button. Once the file is selected, click 'Next'. If you have problems uploading a file contact DUA @ xxx-xxx-xxxx

[Browse...](#)[Previous](#)[Next](#)

4. If there are no errors, the following page will appear displaying the summary of wage details by employer account number and reporting unit. Click 'Next' to continue with the wage detail submission. Click 'Save and Exit', if you wish to return later.

NOTE: If you had more than 200 records to upload, your file will not be processed immediately. Instead, you will get a message stating that the records will be processed in a nightly batch. You will be able to view the status of your submission on the 'View Submission History' screen.

[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance
Employment and Wage Detail Reporting

- ▶ Submit Employment and Wage Detail File
- ▶ Submit Employment and Wage Detail File for Quarters Prior to 2010
- ▶ View Employer History
- ▶ View Submission History

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100

TPA Name: XXXXXX

Employment and Wage Detail Submission Process



Summary of Units Reported

Employer Account Number	Unit Number	Business Name	Year	Quarter	Total UI Gross Wages	Number of Records	Month #1	Month #2	Month #3
100	0	Employer	2009	July, August, September (Q3)	\$14,000.00	1	1	1	1

[Previous](#)[Save and Exit](#)[Next](#)

5. On the next page you will be asked to certify your submission. Use the checkbox to complete the certification and click 'Next'.
6. The following page will appear, displaying the quarterly contributions due for each employer.



Friday, July 31, 2009
[Print](#)

Change Password | Logoff

TPA Home

Account Maintenance

Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010
- View Employer History
- View Submission History

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100
TPA Name: XXXXXX

Employment and Wage Detail Submission Process

1

Submit Wage Information

2

Confirm Submission

3

Process and Calculate

COMPLETED

Quarterly Calculations

Employer Account Id	Year	Quarter	Submission Type	Total UI Gross Wages	Quarterly Amount Due
1000	2009	July, August, September (Q3)	Adjustment #1	\$14,000.00	\$850.65

Previous

Submit

Click here to view the wage detail calculations for this employer.



7. The wage detail calculations will appear as shown below.

[Change Password](#) | [Logoff](#)[TPA Home](#)[Account Maintenance](#)[Employment and Wage Detail Reporting](#)

- Submit Employment and Wage Detail File

- Submit Employment and Wage Detail File for Quarters Prior to 2010

- View Employer History

- View Submission History

[Payment Information](#)[Searches](#)[User Maintenance](#)**Third Party Administrator**

TPA ID: 10

TPA Name: XXXXXX


Reporting InformationEmployment and Wages Paid for the Quarter: **July, August, September (Q3)**Year: **2009****Employment and Wage Detail Adjustment Calculations**

- The table below illustrates the adjustment's total effect by quarter
- Each line lists the most recently submitted amount, the adjusted submission amount and the difference
- IMPORTANT NOTE: The adjustment process recalculates the quarter adjusted and any subsequent quarters
- Calculations DO NOT include records pending UI staff review. These will be included in a new account statement

	Submission Type	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Amount
Quarterly Wages						
Total UI Gross Wages [Ⓢ]	Submitted		\$15,000.00	\$0.00	\$0.00	\$15,000.00
	Adjusted		\$15,000.00	\$14,000.00	\$0.00	\$29,000.00
	Difference		\$0.00	\$14,000.00	\$0.00	\$14,000.00
UI Taxable Wages [Ⓢ]	Submitted		\$14,000.00	\$0.00	\$0.00	\$14,000.00
	Adjusted		\$14,000.00	\$14,000.00	\$0.00	\$28,000.00
	Difference		\$0.00	\$14,000.00	\$0.00	\$14,000.00
UHI Taxable Wages [Ⓢ]	Submitted		\$0.00	\$0.00	\$0.00	\$0.00
	Adjusted		\$0.00	\$0.00	\$0.00	\$0.00
Contributions						
UI Contribution [Ⓢ]	Submitted		\$859.60	\$0.00	\$0.00	\$859.60
	Adjusted		\$859.60	\$844.99	\$0.00	\$1,704.59
	Difference		\$0.00	\$844.99	\$0.00	\$844.99
UHI Contribution [Ⓢ]	Submitted		\$0.00	\$0.00	\$0.00	\$0.00
	Adjusted		\$0.00	\$0.00	\$0.00	\$0.00
	Difference		\$0.00	\$0.00	\$0.00	\$0.00
Workforce Training Fund [Ⓢ]	Submitted		\$8.40	\$0.00	\$0.00	\$8.40
	Adjusted		\$8.40	\$5.66	\$0.00	\$14.06
	Difference		\$0.00	\$5.66	\$0.00	\$5.66
Secondary Uniform Adjustment [Ⓢ]	Submitted		\$0.00	\$0.00	\$0.00	\$0.00
	Adjusted		\$0.00	\$0.00	\$0.00	\$0.00
	Difference		\$0.00	\$0.00	\$0.00	\$0.00
Penalties and Interest						
Non Filer Penalty [Ⓢ]	Submitted		\$100.00	\$0.00	\$0.00	\$100.00
	Adjusted		\$100.00	\$0.00	\$0.00	\$100.00
	Difference		\$0.00	\$0.00	\$0.00	\$0.00
Interest [Ⓢ]	Submitted		\$31.10	\$0.00	\$0.00	\$31.10
	Adjusted		\$31.10	\$0.00	\$0.00	\$31.10
	Difference		\$0.00	\$0.00	\$0.00	\$0.00
Quarterly Amount Due [Ⓢ]	Submitted		\$999.10	\$0.00	\$0.00	\$999.10
	Adjusted		\$999.10	\$850.65	\$0.00	\$1,849.75
	Difference		\$0.00	\$850.65	\$0.00	\$850.65

[Previous](#)

8. The following confirmation will appear indicating that the process is complete.



Friday, July 31, 2009
[Print](#)

[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance

Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010
- View Employer History
- View Submission History

Payment Information


Searches

User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Employment and Wage Detail Submission Process



Employment and Wage Detail Report Submission Confirmation

- Thank you for using our online Employment and Wage Detail Submission process. You have successfully submitted an Employment and Wage Detail Report for Quarter 3 of Year 2009.
- Your confirmation number is : 00100051_07310914052. For future reference, this number is in View Submission History.
- If you would like to make a payment for amounts due select 'Make Payment' at the bottom of this page.
- If you are closing your business and this is your final Employment and Wage Detail Report Select 'Account Maintenance' then 'Suspend Account' from the left navigation and proceed with the prompts.

Make Payment

SUBMIT EMPLOYMENT AND WAGE DETAIL FILE FOR QUARTERS PRIOR TO 2010

Introduction

This section of the document will show how a TPA can submit employment and wage detail file for multiple employer accounts for quarters prior to 2010. The instructions here are applicable only if you are using the 'File Upload method' for multiple employers. If you wish to submit employment and wage detail reports using any other method from the individual employer account, please refer to the 'Employment and Wage Detail Reporting section' of the Employer User Guide.

IMPORTANT: The file format for uploading UI Gross wages and UHI gross wages has not changed, when you are submitting these reports for quarters prior to 2010. At the same time, please note that you will not be able to use this method for Quarters beginning 2010.

Step-by-Step Instructions:

1. Navigate to the employment and wage detail home page using the instructions provided in the section 'Navigating to employment and wage detail home'.
2. Click on the link 'Submit Employment and Wage Detail File for Quarters Prior to 2010'. The following page will appear. Locate the UI wage detail file and UHI wage detail file that are ready for upload, from your local folders. Click 'Next'.

The screenshot shows the TPA interface for the Massachusetts Department of Workforce Development. The top navigation bar includes 'Change Password | Logoff' and the date 'Friday, July 31, 2009'. The left sidebar contains a menu with options like 'TPA Home', 'Account Maintenance', 'Employment and Wage Detail Reporting', 'Payment Information', 'Searches', and 'User Maintenance'. The main content area is titled 'Third Party Administrator' and shows 'TPA ID: 100' and 'TPA Name: XXXXXX'. Below this is the 'Upload UI and UHI Files' section, which includes instructions and a list of file names. The 'Select UI Tax Transmission Report File' section has a text input field and a 'Browse...' button. The 'Select UHI Tax Transmission Report File' section also has a text input field and a 'Browse...' button. A 'Next' button is located at the bottom of the form.

3. Both the UI file and UHI file, will be uploaded to QUEST and will be processed by a batch process that runs daily. After the upload is complete, the following page will appear, asking if you wish to submit the DOR wage detail files. Click 'Yes' to continue.

[Change Password](#) | [Logoff](#)

* Indicates Required Field

TPA Home
Account Maintenance
Employment and Wage Detail Reporting
 ▶ Submit Employment and Wage Detail File
 ▶ **Submit Employment and Wage Detail File for Quarters Prior to 2010**
 ▶ View Employer History
 ▶ View Submission History

Third Party Administrator
TPA ID: 100 TPA Name: XXXXXX

DOR Wage Detail Option
Would you like to submit DOR Wage Detail? ☐ No ☐ Yes*

[Previous](#) [Next](#)

4. The following page will appear, prompting you to select the file format for uploading the DOR wage detail file. Choose one of the formats and click 'Next'. **IMPORTANT:** The file format for the DOR wage detail file is similar to the Employment and Wage Detail reports for Quarters beginning 2010. Please refer to the 'Submit Employment and Wage Detail Files' for instructions on file format.

[Change Password](#) | [Logoff](#)

TPA Home
Account Maintenance
Employment and Wage Detail Reporting
 ▶ Submit Employment and Wage Detail File
 ▶ Submit Employment and Wage Detail File for Quarters Prior to 2010
 ▶ View Employer History
 ▶ View Submission History
Payment Information
Searches
User Maintenance

Third Party Administrator
TPA ID: 100 TPA Name: XXXXXX

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 **Submit Wage Information** → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

File Format

- For details related to the most current file formats, select the appropriate link below.
- For details related to multiple file submissions or third party administrators (TPA) filings, click [here](#).

File Type	Record Length	File Extension
<input checked="" type="radio"/> Delimited (i.e., export from Excel with a comma delimiter)	Variable	.bt or .csv
<input type="radio"/> ICESA (NASWA Standard File Format)	275	.bt
<input type="radio"/> EFW2 (Formerly MMREF-SSA)	512	.bt

[Next](#)

5. The following page will appear, prompting you to upload the file. Use the 'Browse' button to upload the file and click on 'Next', to continue.

[Change Password](#) | [Logoff](#)

TPA Home
Account Maintenance
Employment and Wage Detail Reporting
 ▶ Submit Employment and Wage Detail File
 ▶ Submit Employment and Wage Detail File for Quarters Prior to 2010
 ▶ View Employer History
 ▶ View Submission History
Payment Information
Searches
User Maintenance

Third Party Administrator
TPA ID: 100 TPA Name: XXXXXX

Employment and Wage Detail Submission Process

1 Select Filing Method → 2 **Submit Wage Information** → 3 Confirm Submission → 4 Process and Calculate → COMPLETE

Select Wage Detail File
Choose file by selecting the 'Browse' button. Once the file is selected, click 'Next'. If you have problems uploading a file contact DUA @ xxx-xxx-xxxx

[Browse...](#)

[Previous](#) [Next](#)

6. The following confirmation will appear, indicating that your DOR wage detail file has been uploaded. Click on 'Exit' to complete the process.
7. **IMPORTANT:** The DOR wage detail file you uploaded in the previous step will not be used to calculate the Quarterly contributions due for the employer account.

Massachusetts Department of
Workforce
Development

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[Print](#)

Change Password | Logoff

TPA Home
Account Maintenance
Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010**
- View Employer History
- View Submission History

Payment Information
Searches
User Maintenance

Third Party Administrator

TPA ID: 1001TPA Name: XXXXXX

Employment and Wage Detail Report Submission Confirmation

- You have successfully submitted an Employment and Wage Detail file.
- If you would like to make a payment for amounts due, select 'Make Payment' at the bottom of this page.

ExitMake Payment

VIEW SUBMISSION HISTORY

Introduction

This section of the document will show how a TPA can view employment and wage detail submission history. You can view submission history by date range for original and adjusted wage detail reports. The data displayed includes the Submission Date and Time, Filing Method, Confirmation number and error information. You will also be able to view the employer account number and the summary of wage details specific to the submission, by clicking on the 'details' for each submission.

Step-by-Step Instructions:

1. Navigate to the employment and wage detail home page using the instructions provided in the section 'Navigating to employment and wage detail home'.
2. Click on the link 'View Submission History'. The following page will appear. Enter the date range for which you wish to view the submission history. Click on 'Search'

Massachusetts Department of Workforce Development

Friday, November 20, 2009 [Print](#)

[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance

Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010
- View Employer History
- View Submission History**

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Wage Detail Submission History Search

From: To:

[Search](#) [Reset](#)

3. The search results will appear as shown below. Click on the 'details' to view more information on each submission.

Massachusetts Department of Workforce Development

Friday, November 20, 2009 [Print](#)

[Change Password](#) | [Logoff](#)

TPA Home

Account Maintenance

Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010
- View Employer History
- View Submission History**

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Wage Detail Submission History Search

From: To:

[Search](#) [Reset](#)

Search Results							
Submission Date	Submission Time	Confirmation Number	Filing Method	Records	User ID	Employer Details	Record Errors
7/31/2009	2:05 PM	00100051_073109140525	File Upload		tk502	details	
7/31/2009	2:04 PM	00100051_073109140451	File Upload		tk502	details	
7/31/2009	2:04 PM	00100051_073109140427	File Upload		tk502	details	
7/31/2009	1:29 PM	00100051_073109132957	File Upload		tk502	details	

- The details will appear as shown below.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Employment and Wage Detail Reporting](#)
 ▶ [Submit Employment and Wage Detail File](#)
 ▶ [Submit Employment and Wage Detail File for Quarters Prior to 2010](#)
 ▶ [View Employer History](#)
 ▶ [View Submission History](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 1000 TPA Name: XXXXXX

Employment and Wage Detail Submission History Search

Employer Account Number:
Submission Type: All
Year: 2009
Quarter: Select one

Search Results

Employer Account Number	Employer Name	Year/Quarter	Submission Type	Confirmation Number	Number of Records	Total UI Gross Wages	MA Wages Subject to Withholding	MA Income Tax Amount Withheld	Status
1000	Employer	2009/3	Original	00100051_073109140525	1	\$14,000.00	\$0.00	\$0.00	Submit

VIEW EMPLOYER HISTORY

Introduction

This section of the document will show how a TPA can view the summary of employment and wage detail history by employer accounts. You can view the employment and wage detail summary for each assigned employer account for a chosen quarter. The search results will include the employer account number, name, year/quarter, total UI gross wages, amounts due, and wages withheld.

Step-by-Step Instructions:

1. Navigate to the employment and wage detail home page using the instructions provided in the section 'Navigating to employment and wage detail home'.
2. Click on the link 'View Employer History'. The following page will appear. Enter search criteria to limit results by employer account number and/or year/quarter. Click on 'Search'.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010
- View Employer History**
- View Submission History

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

View History Search

Employer Account Number:

Year: 2009

Quarter: All

Search Reset

3. The search results will appear as shown below.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

- Submit Employment and Wage Detail File
- Submit Employment and Wage Detail File for Quarters Prior to 2010
- View Employer History**
- View Submission History

Payment Information

Searches

User Maintenance

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

View History Search

Employer Account Number: 10004344

Year: 2009

Quarter: All

Search Reset

Search Results

Employer Account Number	Employer Name	Year	Quarter	Total UI Gross Wages	Quarterly Amount Due	MA Wages Subject to Withholding	DOR Withheld Amount
10C	Employer	2009	3	\$14,000	\$850.65	\$0	\$0

ASSIGN TPA ROLE

Introduction

This section of the document will explain how an authorized TPA can self-assign the roles - 'Wage Detail - Update/Submit' and 'Payments - Update/Submit' in order to perform corresponding functions on behalf of an employer. In order for TPA (s) to self assign these roles, they must be pre-authorized by the DUA.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the section 'Logging In'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	TPA Home
Employment and Wage Detail Reporting	TPA Home TPA Home
Payment Information	
Searches	
User Maintenance	
	<div> Account Maintenance View or update TPA account information such as; Name, Organization Type, addresses and phone numbers. </div> <div> Employment and Wage Detail Reporting Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function. </div> <div> Searches Search for employers for which the TPA has been assigned account access. </div> <div> Assign TPA Role Submit client(s) for assignment of employment and wage detail and payment roles </div> <div> Payment Information Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function. </div> <div> User Maintenance Create new or update existing TPA user information </div>

2. Click on the link 'Assign TPA Role'. This link will be available only if your account has been authorized by the DUA for self – assigning roles.
3. The following page will appear. If you wish to assign roles manually using the online method, enter your choice using the radio buttons and continue to the next step. Otherwise, proceed to step 6 for instructions to use the file upload method.

NOTE: The 'Online' method allows only one employer account to be associated with the TPA account at a time. To add more than one employer, the process should be repeated. The 'File Upload' method allows more than one employer to be added at a time.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	Select Role Assignment Method
Employment and Wage Detail Reporting	Select the method in which you would like to create or modify your roles for an employer.
Payment Information	<input checked="" type="radio"/> Online
Searches	<input type="radio"/> File upload [®]
User Maintenance	<input type="button" value="Next"/>

4. The following page will appear. Enter the employer account number and click 'Next'.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Assign TPA Role](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Select Role Assignment Method

Enter the Employer Account Number to identify the Employer for which you would like to create roles for

Employer Account Number:

Previous

Next

* Indicates Required Field

5. The following page will appear. Enter the required information and click on 'Submit' to continue.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Assign TPA Role](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Employer

Employer Account Number: 100

Employer Name: 052808

Assigned Roles

Employment and Wage Detail Update and Submit

Payments Update and Submit

Enter Service Dates

TPA Service Begin Date:

TPA Service End Date:

Select All Employer Reporting Units

☐ Check this box if the role being assigned is for all reporting units. If this checkbox is selected, the assigned role will apply to all new Employer reporting units. Otherwise, roles will need to be assigned after the new Employer reporting unit is created.

Assigned Employer Reporting Units

No records found...

Unassigned Employer Reporting Units

Add	Reporting Unit Number	Physical Address
<input type="checkbox"/>	0000	BEACON ST., BOSTON

Previous

Submit

The 'assigned roles' are displayed here.

Click here to apply the assigned roles to all reporting units

Click here to apply the assigned roles to this reporting unit.

6. A confirmation will appear on the next page indicating the role assignment process is complete.

7. Continued from step 3: Choose 'File Upload' using the radio buttons.

[Change Password](#) | [Logoff](#)

[TPA Home](#)
[Account Maintenance](#)
[Assign TPA Role](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[Searches](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXX

Select Role Assignment Method

Select the method in which you would like to create or modify your roles for an employer.

☒ Online
 ☐ File upload

Next

NOTE: File Format Instructions

Upload a .txt file with the following data to assign employment and wage detail and payment to you on behalf of your client(s): The file should like below:



- The first row of the file should contain the TPA ID (Max 9 characters)
- The second row and the subsequent rows should contain the employer details in the following order:

EAN (Max 8 characters),Unit Identifier (1 = All Existing and New Units, 0 = Some of the Existing Units),Reporting Unit (Leave blank if "1" entered above. If 0, only enter one reporting unit per record. If multiple units need to be assigned, submit a record for each unit),Begin Date (MMDDYYYY),End Date (MMDDYYYY)

8. The following page will appear. Locate and upload the text file containing the employer- role assignment details using the 'Browse' button. Click 'Next' to process the uploaded file.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance	<div>Third Party Administrator</div> <div>TPA ID: 1001 TPA Name: XXXX</div> <div>Select Role Assignment File</div> <div>Select the appropriate file by clicking on the 'Browse' button. Once the file is selected click 'Next'.</div> <div> <input type="text"/> <input type="button" value="Browse..."/> </div> <div> <input type="button" value="Previous"/> <input type="button" value="Next"/> </div>

9. The confirmation page will appear indicating that the upload process is complete.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance	<div>Third Party Administrator</div> <div>TPA ID: 1001 TPA Name: XXXX</div> <div>Role Assignment Confirmation</div> <div>The role assignment was processed successfully.</div> <div>Role Assignment Message(s)</div> <div>Role assignment made for Employer Account Number 83 effective 11/22/2009</div> <div> <input type="button" value="Previous"/> </div>

USER MAINTENANCE

Introduction

This section of the document will explain how an authorized user can create new or modify existing TPA user accounts. Within each TPA user account, role assignment allows you to specify the level of access for the TPA user account.

Step-by-Step Instructions:

CREATE TPA USER ACCOUNT:

1. Navigate to the TPA home page/splash page. If required, please refer to the section on 'Navigating to TPA Home page/Splash Page'.
2. Click on the link 'Third Party Administrator Roles'. The following page will appear.

Change Password | Logoff

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

• **Third Party Administrator Roles**

Third Party Administrator

TPA ID: 1001 TPA Name: XXXX

User Search Criteria

User ID:

Last Name:

First Name:

Roles: Any

Search Reset New

Enter search parameters and click here to view/modify existing account.

Click here to create new user account.

3. Click on 'New'. The following page will appear. Enter the required information and click on 'Save'

Change Password | Logoff * Indicates Required Field

TPA Home

Account Maintenance

Assign TPA Role

Employment and Wage Detail Reporting

Payment Information

Searches

User Maintenance

• **Third Party Administrator Roles**

Third Party Administrator

TPA ID: 1001 TPA Name: XXXX

User Details

First Name: *

Middle Initial:

Last Name: *

Telephone: ext.

eMail: *

Employee ID [?] *

4-digit PIN Code [?] *

Effective Start Date: *

Effective End Date:

New Comments

Save Cancel

- The new user account will be created and the login credentials will be emailed to the email address provided in step 3. The following page will appear confirming the same.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance ▶ Third Party Administrator Roles	<div>Third Party Administrator</div> <div>TPA ID: 100 TPA Name: XXXX</div> <div>Password Link Sent</div> <div>An eMail message has been sent to the user containing an encrypted link which that user can use to login to the system and establish a password.</div> <div>Note: This password link will only be effective for the next 2 hours.</div> <div style="text-align: right;">Next</div>

- Please refer to the section below, for instructions to assign roles to the newly created TPA user account. This step is required; otherwise, the user will not be able to perform any functions using the newly created account.

MODIFY TPA USER ACCOUNT:

- Follow the first two steps outlined in the instructions to create a new TPA account.
- Click on 'Search', after entering search parameters. The following page will appear with the search results. Click on the user ID to continue.

Change Password Logoff											
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance ▶ Third Party Administrator Roles	<div>Third Party Administrator</div> <div>TPA ID: 1000 TPA Name: XXXX</div> <div>User Search Criteria</div> <div> <div>User ID: <input type="text" value="tk501"/></div> <div>Last Name: <input type="text"/></div> <div>First Name: <input type="text"/></div> <div>Roles: <input type="text" value="Any"/></div> </div> <div> Search Reset New </div> <div>User Search Results</div> <table border="1"> <thead> <tr> <th>User ID</th> <th>Last Name</th> <th>First Name</th> <th>Eff. Start</th> <th>Eff. End</th> </tr> </thead> <tbody> <tr> <td>tk501</td> <td>K</td> <td>Tom</td> <td>11/19/2009</td> <td></td> </tr> </tbody> </table> <div style="border: 1px solid black; border-radius: 15px; padding: 10px; margin-top: 10px;"> <p>Click here to view/modify this user account.</p> </div>	User ID	Last Name	First Name	Eff. Start	Eff. End	tk501	K	Tom	11/19/2009	
User ID	Last Name	First Name	Eff. Start	Eff. End							
tk501	K	Tom	11/19/2009								

- The following page will appear, providing a list of account modification options.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	
Employment and Wage Detail Reporting	
Payment Information	
Searches	
User Maintenance	
Third Party Administrator Roles	
	User Details
	User Type: Agent
	User ID: tk501
	First Name: Tom
	Middle Initial:
	Last Name: K
	Telephone:
	eMail:
	Employee ID [?]
	PIN Code [?] 2135
	Effective Start Date: 11/19/2009
	Effective End Date:
	Last Logged On: 11/22/2009
	Incorrect Password Attempts: 0
	Account Status: Active
	Security Question: What was the name of the street you grew up on?
	Security Answer: s
	Modify User Attributes
	Modify Update the basic information for this user.
	Roles View/Edit security roles for which this user is assigned.
	Reset Password Reset the user's password by sending a "password reset" eMail.
	Inactivate Inactivate the user's access to the system.
	Previous

List of account modification options - with brief descriptions.

4. Modify: Click on 'Modify' in step 3. The following page will appear. Enter your changes and click 'Save' to confirm the changes.

Change Password Logoff * Indicates Required Field	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	
Employment and Wage Detail Reporting	
Payment Information	
Searches	
User Maintenance	
Third Party Administrator Roles	
	User Details
	User Type: Agent
	User ID: tk501
	First Name: Tom *
	Middle Initial:
	Last Name: k *
	Telephone: ext: *
	eMail: *
	Employee ID [?] *
	4-digit PIN Code [?] 2135
	Effective Start Date: 11/19/2009
	Effective End Date:
	Last Logged On: 11/22/2009
	Incorrect Password Attempts: 0
	Account Status: Active
	Security Question: What was the name of the street you grew up on?
	Security Answer: s
	Previous Comments
	New Comments
	Save Cancel

- Click on 'Roles' in step 3. The following page will appear. Use the checkboxes to assign available roles/remove existing roles. Click on 'Save' to confirm the changes.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance ▶ Third Party Administrator Roles	Third Party Administrator TPA ID: 1001 TPA Name: XXXX
	Assign Roles To User User Type: Agent User ID: tk501 Name: Tom K
	Current Roles Assigned to User Remove <input type="checkbox"/> TPA User Description: TPA User <input type="checkbox"/> System Administrator Description: TPA System Administrator
	Available Roles No records found...
	<div>Save Cancel</div>

- Click on 'Reset Password' in step 3. The following page will appear. A warning message will be displayed indicating that you are about to reset the password. Click on 'Confirm' to continue. An email message will be sent to the user with the instructions to reset the password.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance ▶ Third Party Administrator Roles	Third Party Administrator TPA ID: 100 TPA Name: XXXX
	Reset Password Are you sure that you wish to reset the password for: tk501 This action will cause the system to send a secure link to the user's eMail address for the user to click and create a new password.
	<div>Confirm Cancel</div>

- Click on 'Inactivate' in step 3. The following page will appear. A warning message will be displayed that you are about to inactivate the account. Click 'Confirm' to proceed.

Change Password Logoff	
TPA Home Account Maintenance Assign TPA Role Employment and Wage Detail Reporting Payment Information Searches User Maintenance ▶ Third Party Administrator Roles	Third Party Administrator TPA ID: 100 TPA Name: XXXX
	Inactivate User Are you sure that you wish to inactivate the user: tk501
	<div>Confirm Cancel</div>

8. The following page will be displayed. The account status will read – 'User Inactivated'. If you wish to revive the account in the future, click on 'Reactivate' and follow the prompts to re-activate the account.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	
Employment and Wage Detail Reporting	User Details
Payment Information	User Type: Agent
Searches	User ID: xx505
User Maintenance	First Name: X
• Third Party Administrator Roles	Middle Initial:
	Last Name: X
	Telephone:
	eMail: @detma.org
	Employee ID [?] 2135
	PIN Code [?] 2135
	Effective Start Date: 11/22/2009
	Effective End Date: 11/22/2009
	Last Logged On:
	Incorrect Password Attempts: 0
	Account Status: User inactivated
	Security Question:
	Security Answer:
	Modify User Attributes
Modify	Update the basic information for this user.
Roles	View/Edit security roles for which this user is assigned.
Reset Password	Reset the user's password by sending a "password reset" eMail.
Reinstate	Reinstate the user's access to the system.
	Previous

In the future, click here to re-activate the account if required.

CORRESPONDENCE

Introduction

This section of the document will show how an authorized user can view a correspondence sent from DUA to the TPA account on the QUEST system. All correspondences will be sent to your QUEST account except for ad-hoc and registration correspondences. You will be notified via email when a correspondence is sent to your account. You must login to the QUEST system to view the correspondence. You can set up your preferred email address to receive notifications using the instructions provided in the 'Address Information' section of this user guide.

NOTE: You must have Adobe Reader software installed to view the correspondence. This software can be downloaded for free at www.adobe.com

Step-by-Step Instructions:

1. Navigate to the TPA home page. The home page will appear as shown below. Click on the link 'Correspondence'.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Correspondence	TPA Home
Employment and Wage Detail Reporting	TPA Home TPA Home
Payment Information	
Searches	
User Maintenance	
	<div> Account Maintenance View or update TPA account information such as; Name, Organization Type, addresses and phone numbers. </div> <div> Correspondence Search for Correspondence. </div> <div> Employment and Wage Detail Reporting Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function. </div> <div> Payment Information Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function. </div> <div> Searches Search for employers for which the TPA has been assigned account access. </div> <div> User Maintenance Create new or update existing TPA user information </div>

2. The correspondence home page will appear as shown below.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Correspondence	Correspondence Search
Employment and Wage Detail Reporting	Date Range From: <input type="text"/> To: <input type="text"/>
Payment Information	
Searches	<input type="button" value="Search"/> <input type="button" value="Reset"/>
User Maintenance	

3. Enter the date range for which you wish to search correspondence for. Click on 'Search'.
4. The search results will appear as shown below. Click on the correspondence number to view a correspondence.

Change Password Logoff			
TPA Home Account Maintenance Correspondence Employment and Wage Detail Reporting Payment Information Searches User Maintenance Reporting	Third Party Administrator		
	TPA ID: 100 TPA Name: XXXX		
	Correspondence Search		
	Date Range From: <input type="text"/> To: <input type="text"/>		
	<input type="button" value="Search"/> <input type="button" value="Reset"/>		
	Details		
Correspondence Number	Transaction Date	Form ID	Description
3018757	11/27/2009		Third Party Administrator Role Assignment Notification - Employer

5. The selected correspondence will appear in a new window in pdf format.

SEARCHES/EMPLOYER ACCOUNT HOME

Introduction

This section of the document will show how an authorized user can search and view the individual employer home pages of assigned employers. Once at the employer home page, you will be able to access & perform most of the employer functions on behalf of the employer. However, the functions that you will be able to perform will be controlled by the roles assigned to you by the employer. Once you are at the employer home page, you will be able to see only the functions assigned by the employer. Please refer to the Employer User Guide for complete information on all the functions, performed from an employer account. You must contact the employer you are servicing to gain access to a role you require.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the section 'Logging In'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	TPA Home
Employment and Wage Detail Reporting	TPA Home TPA Home
Payment Information	
Searches	
User Maintenance	
	<div> Account Maintenance View or update TPA account information such as; Name, Organization Type, addresses and phone numbers. </div> <div> Employment and Wage Detail Reporting Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function. </div> <div> Searches Search for employers for which the TPA has been assigned account access. </div> <div> Assign TPA Role Submit client(s) for assignment of employment and wage detail and payment roles </div> <div> Payment Information Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function. </div> <div> User Maintenance Create new or update existing TPA user information </div>

2. Click on the link 'Searches'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXXXX
Assign TPA Role	Searches
Employment and Wage Detail Reporting	Client/Rate Download Search for Employer/client rates file.
Payment Information	Employer Search Search for Employers/clients by Employer Name, Employer Account Number, and/or role.
Searches	
<ul style="list-style-type: none"> Client/Rate Download Employer Search 	
User Maintenance	

- Click on the link 'Employer Search'. The following page will appear.

- The search results will appear as shown below. Based on your search criteria, one or more employer accounts displayed. Along each employer name, the assigned role(s) will also be displayed. Click on the Employer name to go to the home page of the employer.

Employer Name	FEIN	EAN	Role	Services Begin Date	Services End Date
Employer	100	10C	Account Maintenance Update and Submit	7/31/2009	
Employer	100	10C	Benefit Charges Protest Submission	7/31/2009	
Employer	100	10C	Payments Update and Submit	7/31/2009	
Employer	100	10C	Employment and Wage Detail Update and Submit	7/31/2009	
Employer	100	10C	Wage and Separation Mailing	7/31/2009	
05		10C	Account Maintenance Update and Submit	11/20/2009	
05		10C	Benefit Charges Protest Submission	11/20/2009	
05		10C	Payments Update and Submit	11/20/2009	
05		10C	Employment and Wage Detail Update and Submit	11/20/2009	

Select Link for [Role Definitions](#)

- The employer home page will appear as shown below. You will be able to perform employer functions from here by clicking on the appropriate links. Please refer to the employer user guide for the complete set of instructions on performing employer functions.

While you are at this page, you will be able to go to a different employer account by clicking on the link 'Change Employer'. Click on 'Leave Employer' to leave the employer home page and return to the TPA home page.

[Change Password](#) | [Logoff](#)

[Employer Home](#)
[FAQ/Contact Us](#)
[Account Maintenance](#)
[Benefit Charge Activities](#)
[Correspondence](#)
[Employment and Wage Detail Reporting](#)
[Payment Information](#)
[User Maintenance](#)

Third Party Administrator

TPA ID: 100 TPA Name: XXXXXX

Employer Information

Employer Account Number: 100i Employer Name: Employer

Employer Home

[Employer Home](#)
 Employer Home

[FAQ/Contact Us](#)
 Review frequently asked questions (FAQ's) for the UI program or UI system. Submit inquiries if the FAQ does not answer your question.

[Benefit Charge Activities](#)
 View Benefit Charges by calendar year and quarterly summaries; claimant detail summaries; and individual claimant transaction details. Additional information includes fiscal year summaries with tax rate buydown and/or merger-acquisition details related to benefit charges.

[Employment and Wage Detail Reporting](#)
 Submit Employment and Wage Detail Reports for this Agency and the Department of Revenue. View historical Employment and Wage Reporting information.

[User Maintenance](#)
 Assign or Update user access to Employer account information.

[Account Maintenance](#)
 Maintain account information including changing legal name, mailing address, owners/officers, reporting units, or reporting status. View the most recent Tax Rate Notice, authorize TPAs or provide information regarding the purchase or sale of a business.

[Correspondence](#)
 Search for Correspondence

[Payment Information](#)
 Make payments; view account summary, pending payments, processed or cancelled payments, taxable wages, and FUTA credit information.

Click here to go to TPA home page.

This area will display the available employer maintenance functions.

SEARCHES/ CLIENT RATE DOWNLOAD

Introduction

This section of the document will show how a TPA can download the tax rates of clients assigned to the TPA account.

Step-by-Step Instructions:

1. Navigate to the TPA home page. If required, please refer to the section 'Logging In'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXX
Assign TPA Role	TPA Home
Employment and Wage Detail Reporting	TPA Home TPA Home
Payment Information	
Searches	
User Maintenance	
	<div> Account Maintenance View or update TPA account information such as; Name, Organization Type, addresses and phone numbers. </div> <div> Employment and Wage Detail Reporting Submit Employment and Wage Detail files for multiple or individual employer accounts (adjustments and original reports), or view employment and wage detail report information for TPA submissions and client groups. To manage Employment and Wage Detail Reports for individual employer accounts, this includes 'Copy from Previous' or 'Manual' submissions, navigate to the Employer's account via the 'Searches' function. </div> <div> Searches Search for employers for which the TPA has been assigned account access. </div> <div> Assign TPA Role Submit client(s) for assignment of employment and wage detail and payment roles </div> <div> Payment Information Make payments for multiple or individual employer accounts or view payment information for agent submissions and client groups. To manage individual employer accounts, navigate to the employer's account via the 'Searches' function. </div> <div> User Maintenance Create new or update existing TPA user information </div>

2. Click on the link 'Searches'. The following page will appear.

Change Password Logoff	
TPA Home	Third Party Administrator
Account Maintenance	TPA ID: 100 TPA Name: XXXXXX
Assign TPA Role	Searches
Employment and Wage Detail Reporting	Client/Rate Download Search for Employer/client rates file.
Payment Information	Employer Search Search for Employers/clients by Employer Name, Employer Account Number, and/or role.
Searches	
<ul style="list-style-type: none"> ▸ Client/Rate Download ▸ Employer Search 	
User Maintenance	

3. Click on the link 'Client/Rate Download'. The following page will appear.

Change Password Logoff	
TPA Home Account Maintenance Correspondence Employment and Wage Detail Reporting Payment Information Searches • Client/Rate Download • Employer Search User Maintenance	Third Party Administrator
	TPA ID: 1001
	TPA Name: XXXX
	Client/Rate Download
	Enter dates to search for all rate files created between 'From' and 'To' dates.
	Date Range From: <input type="text"/> To: <input type="text"/>
<input type="button" value="Reset"/> <input type="button" value="Search"/>	

4. Enter a date range parameter for rate file creation. Click on 'Search'.
5. Follow the prompts to download the file to your local folders.

ABBREVIATIONS

DUA	Division of Unemployment Assistance
DOR	Department of Revenue
FEIN	Federal Employer Identity Number
LLC	Limited Liability Corporation
MA	Massachusetts
SSN	Social Security Number
TPA	Third Party Administrator
UI	Unemployment Insurance
UHI	Unemployment Health Insurance

ADDENDUM

A. HOURS WORKED GUIDELINE

How do I report hours worked? General Rule:

1. If the employer knows the actual number of hours worked, the employer should report that figure.
2. If the employer does not know the actual number of hours worked, the employer should:
 - A. for full-time employees use 40 hours per week.
 - B. for part-time employees, employer should estimate the number of hours.
 - C. for full-time plus, employer should use 40 hours per week plus an estimate.

Overtime:

The employer should report the number of hours actually worked for which overtime pay or compensatory time is paid without regard for the overtime pay rate. Compensatory time should be reported when taken, not when earned.

Fractions of hours:

If the employee's total number of hours in a quarter results in a fractional amount, the total figure should be rounded to the nearest whole hour. If the fraction is "1/2 hour" or more it should be rounded up to the next whole hour, and if it's less than a 1/2 hour, it should be rounded down.

Vacation/sick/holiday pay:

The actual number of hours for which an employee receives vacation, sick or holiday pay should be reported. Vacations, sick days and Holidays without pay should not be counted as hours worked.

On call:

Hours in which the employee is carrying a pager, or is otherwise "on call" should not be included in the "hours worked" calculation.

Employees not paid by the hour:

These include salaried workers and those paid by commission. Also included are workers who are paid by the mile, by piecework, by the acre, by the payload, by reductions in rent, or other non-hourly rates. When the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at the rate of 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Wages paid less than once per quarter:

This will occur most often with corporate officers who are paid only once or twice a year. The employer should report the number of hours worked in any quarter in which no wages were paid, along with \$0 wages. Then, when wages or salaries are finally paid, only the hours worked in that specific quarter should be reported. If the actual number of hours worked is available, it should be reported. In the absence of reliable figures, full-time employees should be reported at 40 hours per week; hours worked by part-time employees and those who work more than full-time should be estimated.

Faculty members of colleges and universities (includes technical and community colleges):

If the faculty member is considered to be a full-time employee, 40 hours per week paid should be reported. If the faculty member is considered to be part-time, an estimate of the actual hours worked should be made.

School teachers

When teachers or other staff work nine months but are paid over 12 months, their hours should be reported in the quarters that they actually work. For part-time faculty, coaches, etc., if hours are not known, employers may establish an hourly rate of pay and divide that into quarterly gross wages to obtain an estimate of hours.

Volunteer Firefighters:

Employers can establish an hourly rate of pay and divide that amount into the quarterly gross wages to obtain an estimate of hours.

B. EMPLOYMENT AND WAGE DATA SUBMISSION GUIDELINES AND INFORMATION

This is a document available at the DUA QUEST website, providing extensive detail for processing Employment and Wage data through the new QUEST System. This document focuses on process flows, key business rules and changes, and provides employers and agents the contact information necessary to make the necessary preparations for change. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

C. ICESA FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating ICESA Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

D. EFW2 FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating EFW2 Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.

E. DELIMITED FILE FORMAT SPECIFICATIONS

This is a document available at the DUA QUEST website, providing extensive detail with key information, data definitions, and formatting instructions for generating Delimited Employment and Wage File for submission to the Massachusetts Department of Unemployment Assistance. Go to the online version of the Table of

TPA User Guide

Contents of this TPA User Guide available at www.mass.gov/uima and click on the corresponding link under addendum to access this document.